

**Department of Workforce Development/Division of Workforce Solutions
Bureau of Migrant, Refugee and Labor Services**

Instructions for Completing the Targeted Assistance Program (TAP) & Social Services (SS) Quarterly Program Reports

(Revised February 2004)

(Adopted from ORR's Instructions)

Employment and training providers must complete a Quarterly Program Report every three months. Agencies receiving both Social Service and Targeted Assistance Program funds must complete both reports. The QPR format can be furnished in an electronic format, if requested. The following information must be provided in the quarterly report:

1. **Cover Sheet (identifying a SS or TAP QPR)**
2. **Schedule A (Program Narrative)**
3. **Schedule C**
4. **Attachments 1, (Placements/Entered Employment, by-name listing)**

Employment and Training Quarterly Program Reports are due on the following dates:

	Targeted Assistance Program (TAP)	Social Services (SS)
4 th Quarter, 2003	January 15, 2005	January 31, 2004
1 st Quarter, 2004	April 15, 2004	April 30, 2004
2d Quarter, 2004	July 15, 2004	July 31, 2004
3 rd Quarter, 2004	October 15, 2004	October 31, 2004
4 th Quarter, 2004	January 15, 2005	January 30, 2005

Forward all Office of Refugee Service QPR's to:

Department of Workforce Development
Division of Workforce Solutions
Bureau of Migrant, Refugee and Labor Services
ATTN: Your Refugee Contract Monitor Name
201 E. Washington Ave Room G100
P. O. Box 7972
Madison, WI 53707-7972

Fax: 608/261-8506

Table of Contents

Chapter	Section	Topic	Page
Chapter I	A	Social Services Program Description	4
	B	Targeted Assistance Employment and Training Program Description	4
	C	Case File Requirements	4
	D	Family Self Sufficiency Plans	5
	E	Cash Assistance Status Definitions	6
	F	Grant Termination Definition	7
	G	Grant Reduction Definition	7
	H	Grant Diversion	8
	I	Completing the QPR with MS Excel	8
Chapter II		Quarterly Report Submission	9
	A	Quarterly Report Cover Sheet	9
	B	Program Narrative (Schedule A)	9
Chapter III		Attachment 1: Refugee Placements Entering Employment	10
	A	Background	10
	B	Entering Employment	10
	C	Instructions to complete Attachment #1	11
	D	Cash Assistance Status	12
	E	Grant Termination/Grant Reduction Status	14
	F	Health Benefits Definition	14
	G	Employed 90 Days Later Definition	15
Chapter IV		Schedule C: Services Report	16
	Row A	Total Caseload	17
	Row B	Active Participants this Quarter	17
	Row C	Entered Employment this Quarter	18
	Row C	Grant Terminations	18
	Row C	Grant Reductions	19
	Row C	Employment Goals	19

	Row C	Schedule C Totals	19
	Row D	Average Wage when Entering Employment	20
	Row E	Health Benefits Available	20
	Row F	Employed 90 days later Totals	20
	Row G	Program Expenditures	20
Chapter V		Schedule C, Page 2 Other Services	21
	Row 1	English Language Training	21
	Row 2	Training	21
	Row 2(A)	On-the Job Training	21
	Row 2(B)	Skills Training	21
	Row 3	Case Management	22
	Row 4	Other Services	24
	Row 5	Citizenship Services (Social Service QPR Only)	24
Chapter VI		Common Errors When Completing QPRs	26
Enclosure		Example Social Service QPR	

Chapter I.

A. Social Services

1. Social Services funds are generally only for services to refugees in the first 60 months of resettlement. However, funds available under Social Services may be used to provide services to refugees who have been in the United States for more than 60 months (5 years) under the following limited circumstances **regardless of date of entry**.

- (a) Social Services funds may be used to provide referral services
- (b) Social Services funds may be used to provide interpreter services, and
- (c) Social Services funds may be used for citizenship assistance to refugees.

2. Social Service (SS) funds are to provide culturally competent employment and training, case management and supportive services to refugees. Eligibility is limited to refugees who have been in the U.S. five years or less, with the exception of the three uses outlined above. Services must be provided to the newer populations of refugees in your service delivery area. Bilingual staff capacity funded by social services monies must be roughly proportionate to the languages spoken by these refugees.

3. Social Service eligible refugees. See paragraph II of Appendix A of the refugee contract.

B. Targeted Assistance Employment and Training Program.

1. TAP funds are to provide employment and training services primarily for the over-five-year refugee population on public assistance, but can be used to provide services to all refugees, regardless of how long they have been in the U.S. who have extensive employment needs.

2. Targeted Assistance Employment and Training eligible refugees. See paragraph II of Appendix B of the refugee contract.

C. Case File Requirements.

1. All cases/families must have a Family Self-Sufficiency Plan (FSP) and all employable adults in the family must have an assessment and Employability Development Plan (EDP) completed by both the case manager/job developer and the client(s) within 30 days of receipt of Refugee Cash Assistance for new arrivals.

2. Refugee agencies must establish a case file for refugees receiving Targeted Assistance Program or Social Service Program assistance. Each case must have:

- (a) Documentation of refugee eligibility (for example, copies of I-94's or I-551s)

- (b) Documentation of what type of assistance (W-2, FS) or level of income, the client has. This information will help determine whether gaining employment can count towards a Grant Termination or Grant Reduction.
- (c) Within 30 days of opening the case, the case manager must complete the Family Self-Sufficiency Plan (FSP), including the Intake, Assessment and EDP for each adult member of the family. (A W-2 or FSET employability plan is sufficient, if the refugee agency agrees to the plan).
- (d) Once a refugee gains employment, a record of where employed, type of position, and wage must be made in the case file.
- (e) Record case follow-up activity in the case file. At least every thirty days, the case manager must follow-up with each family and/or service provider(s) to determine progress. A record of the follow up must be maintained in the case file.
- (f) After 90 days, make a note in the case file if the refugee has retained employment, the current wage, and employer.
- (g) Every six months, the case manager must update/revise the FSP, especially the EDP. The updated plan must be maintained in the case file.

The case manager will provide the gatekeeper function and will coordinate services for the family. The case manager will track the family progress and will train this responsibility until such time as the family becomes self-sufficient.

D. Family Self-sufficiency Plan

A Family Self-sufficiency Plan (FSP) includes:

- (a) an Intake form;
- (b) an Assessment form; and
- (c) an Employability Development Plan (EDP).

An Assessment form and EDP must be completed for each employable adult member of the family. Both the case manager/job developer and the client must sign the EDP. A copy of the W-2 EDP may be used to meet this requirement. Copies of clients' I-94 or I-551 (both sides), social security cards and other employment and health related records must be included in the case file.

Case Management Activities:

- (a) Case Management outcomes do not include employment.
- (b) Review the Case Management Instructions published September 24, 2002 for details on how to develop case management goals and report outcomes. Social Service and TAP funds can be used to help meet the changing needs of refugee families. Case

Management is a systematic, progressive method of screening, assessing and planning to assist the refugee family become self-sufficient.

- (c) Services include intake, assessment, development of an Employability Development Plan (EDP), or Family Self-Sufficiency plan orientation, information/referral, service arrangement, individual advocacy, follow-up and the continual monitoring and adjusting of the refugee's participation in such services.
- (d) If there is a case management goal for the client, clearly indicate the following:
 - (1) Identify the case management goal
 - (2) The timeline established to achieve the goal
 - (3) The resources the refugee agency will use to help the refugee achieve the goal
 - (4) The date the goal was either achieved, or the date the goal was adjusted and a new goal established.

E. Cash Assistance Status. The refugee's Cash Assistance status upon entering employment must be reported. Match Grant recipients ARE NOT eligible to be counted towards TAP or SS employment and training goals, their information cannot be included on Attachment 1.

(1) **Refugee Cash Assistance (RCA).** Newly arriving refugees (available only during the first eight (8) months in the U.S.) may be participating (if eligible) in the RCA program. All RCA cases/families must have a Family Self-Sufficiency Plan (FSP) and all employable adults in the family must have an assessment and Employability Development Plan (EDP) completed by both the case manager/job developer and the client(s) within 30 days of receipt of Refugee Cash Assistance.

(2) **Wisconsin Works (W-2).** Refugees may participate (if eligible) in any of the components of the W-2 program, including:

- (a) Case Management Only (no cash assistance)
- (b) Trial Jobs
- (c) Community Service Jobs
- (d) W-2 Transitions
- (e) Custodial Parent of a Newborn

(3) **Other Cash Assistance** is defined as a refugee receiving Cash Assistance from one of the following programs:

- (a) General Relief, or
- (b) Supplemental Security Income, or
- (c) Kinship Care

(4) **No Cash Assistance (No CA)** is defined as an unemployed refugee that is not receiving any cash assistance, **or** he/she can be receiving cash from one of the following sources:

- (a) Reception and Placement, or
- (b) Unemployment Compensation (UI), or

- (c) Worker's Compensation or
- (d) Food Stamps, or
- (e) Medical Assistance/BadgerCare

F. Grant Termination Definition.

A Grant Termination is the removal of a welfare dependent family from public cash assistance, i.e., W-2 subsidized employment, General Relief, Refugee Cash Assistance, or SSI by obtaining employment. Grant Terminations count as a full credit towards the employment goal. In order to count a Grant Termination as an outcome, the case must have had the cash assistance terminated.

The following examples will be counted as meeting the objective:

- (1) If the refugee family was receiving W-2, and the cash assistance ended because the refugee got a job and is no longer W-2 eligible, or*
- (2) The family has relocated out-of-state for employment and is no longer receiving any form of public cash assistance in Wisconsin.*

On Social Service QPR's only:

Refugees in their first month in the U.S. who enter employment **before** receipt of cash assistance, can be reported as Grant Terminations because his employment occurred prior to receipt of assistance.

The agency can report only ONE Grant Termination for a family that has multiple wage earners.

G. Grant Reduction (GR) Definition.

A Grant Reduction is reducing the level of dependency on welfare through employment. Refugees participating in Wisconsin Works (W-2) or Refugee Cash Assistance may have their grant reduced if they begin working part-time, or if a family member gains an unsubsidized job. Grant Reductions may also occur for those receiving Supplemental Security Income (SSI), or General Relief, as their income from employment rises. Grant Reductions and Grant Diversions both count as one-half credit towards the employment and training goal.

The following are Grant Reduction examples:

- (1) One member of a RCA household is placed in unsubsidized employment while the secondary wage earner continues in a subsidized employment position.
- (2) One member of a W-2 household is placed in unsubsidized employment while the secondary wage earner continues in a subsidized employment position.

(3) SSI is reduced as a result of the refugee gaining employment:

(4) General Relief is reduced as a result of the refugee gaining employment.

H. Grant Diversion

Beginning in 2004, agencies are no longer asked to categorize refugees using the "Grant Diversion" category. After analyzing refugee employment information for the last three years, the Bureau of Migrant, Refugee and Labor Services determined that most refugees identified as Grant Diversions were unemployed prior to their job placement. Therefore, the number of employed refugees in the reporting quarter provides the information needed.

I: Completing the QPR with MS Excel.

- (1) Many agencies have found it more efficient to complete the quarterly program report using the electronic spreadsheet forms. If you do not have the MS Excel spreadsheet, please contact your Contract Monitor.
- (2) Instructions to open the MS Excel QPR forms on disc.
 - (a) Insert the SS or TAP diskette into the a:drive of your computer.
 - (b) There is one Microsoft Word document and two Excel Spreadsheets. The Word document is a copy of the 2004 Instructions for Completing the Employment and Training QPR's. The Microsoft Excel documents are:
 - ❑ 2004 SS ET Quarterly Program Report.xls
 - ❑ 2004 TAP ET Quarterly Program Report.xls
 - (c) Open the applicable spreadsheet (SS or TAP).
 - (d) Save the newly opened document as a separate file name. For example, when completing the First Quarter, 2004 TAP QPR, save it as your agency name1stQtr2003TAPQPR.xls. (For example: ADVOCAP 1Qtr 2004 TAPQPR.xls).
 - (e) There are tabs (or "pages") on the bottom of both spreadsheets. The QPR has tabs that look like this:

1Q Att 1	1 Q Schedule C	1 Q Other Services	2 Q Att 1	2 Q Schedule C	2 Q Other Services	3 Q (continued)
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- (f) Click on **Attachment #1**. The colored cells are protected and cannot be changed. Review the instructions on the following pages in order to complete Attachment 1. When answering "yes" to a question, enter a "1" in the cell.
- (g) Click on the **SS Schedule C** tab. Note that wherever '1' was entered in attachment #1, the corresponding cells on Schedule C are automatically completed. However, each agency must manually enter the necessary information in the unshaded cells, to determine which employed refugees count towards a Grant Termination or Grant

Reduction, and also calculate the Average Wage of refugees employed during the quarter.

- (h) Click on **Other Services** tab. The "Other Services" portion of the QPR includes ESL, training and Case Management.
- (i) In addition to the spreadsheet, agencies must also complete a narrative. The narrative should include:
- (j) Agencies should forward the completed QPR's electronically by e-mail to their refugee Contract Monitors. Receiving the QPR electronically facilitates the compilation of the statewide quarterly report.

Chapter II.

A. The Cover Sheet

The Cover Sheet must:

- (1) Clearly identify the reporting agency.
- (2) Identify the person completing the report.
- (3) Be reviewed and signed by the agency director.

B: Program Narrative (Schedule A)

- (1) Employment and training agencies that receive both SS and TAP funds must complete a separate narrative (Schedule A) for each program. Report only activities that are pertinent to the program. Report on cooperative efforts with other local agencies.
- (2) The program narrative is your opportunity to report on successes and also to request technical assistance from the Bureau of Migrant, Refugee and Labor Services. For example,
 - (a) Identify program accomplishments (highlight public assistance cases that have closed, for example).
 - (b) Identify problem areas (have employers that have hired refugees had recent layoffs due to the economy, for example).
 - (c) Describe the case management goals that were achieved (did a refugee gain a driver's license, for example).
 - (d) Describe inter-agency coordination. For example, training your agency may have provided for the W2 agency.
 - (e) Describe the types of training that were accomplished (C.N.A.?).
 - (f) Identify program goals for the coming quarter (employer onsite presentations, or planned VESL classes, for example).
 - (g) Report your outreach efforts to assist Food Stamp, RCA and W-2 recipients.

- (h) When reporting citizenship assistance, describe what activities were conducted, and the number of people involved.
 - (i) When reporting that refugee employees have been laid off, please identify the employer/company and how many people were laid off.
 - (j) When reporting workshops, describe the workshop activities (job search? Resume writing?) and the number of people in attendance.
- (3) Include in the Program Narrative a description of your efforts in providing Case Management assistance.
- (a) Describe the Case Management goals that are being reported on Page 2 of the Schedule C, Other Services. When reporting that Case Management goals have been achieved (page 2 of Schedule C), a brief description of the goal and achievement must be made in the narrative Schedule A. (See the instructions for Page 2, Schedule C, below, for more details).
 - (b) During onsite visits, BMRLS staff will review FSPs and EDPs in order to gain a greater insight into what types of services are needed and being provided.

Chapter III. Refugee Placements/Entering Employment (Attachment 1)

A. Background.

Enter on Attachment 1 refugees that your agency helped gain employment during the reporting quarter. Refugee entering employment include self-placements and placements made by other agencies if the refugee employment agency also facilitated the employment, and provided follow up services.

Each quarter update the information on wage, employer name, etc. The Attachment 1 contains Calendar Year to Date information, and each quarter agencies can continue to add refugee employment information to the previously submitted form.

- (1) Attachment 1 can be completed in MS Excel format. Either complete the form using MS Excel or manually enter the information on a paper copy.
- (2) Make as many copies of this form as necessary

B. Entering Employment

Entered Employment is defined as the entry of an active Employment Services (ES) participant into an unsubsidized employment position for at least for one day during the quarter. Report only one 'entered employment' during the quarter for a refugee.

Refugee agencies may count only one placement per quarter for any client, but if the client obtains a different job in a subsequent quarter, that placement can be reported on a subsequent

Example: The State places Mr. Wu in a minimum wage job in January which reduces his assistance benefit and a better-paying job in March that terminates assistance altogether. In June, he is helped to find a more suitable job with health benefits. In this case, the State would enter one job placement in the second quarter QPR and another in the third quarter QPR.

At the end of the year, for the purposes of reporting to ORR, the State would report (1) one job placement for Mr. Wu, (2) the highest wage, (3) one termination, (4) no reductions, (5) one job retention, and (6) one health benefit availability.

- (1) Match Grant recipients gaining employment cannot be reported on BMRL SS or TAP QPRS, however, Case Management and other services can be reported.
- (2) Information reported must be unduplicated.
- (3) Each active participant can only be reported once during the quarter, regardless of how many jobs the individual obtained.
- (4) Include those who were placed directly by your agency through a documented referral that you agency assisted; those who obtained employment on their own (with some assistance from you); and those who entered unsubsidized employment as a result of completion of On-the-Job Training (OJT).
- (5) Entered employment placements made by another service provider can be claimed by your agency if you were actively working with the client and providing services which support job entry, and also provide follow up services that promote job retention.
- (6) An OJT or W-2 position may not be counted as an entered employment until the period of OJT or Trial Job is completed and the employer has agreed to retain the individual in an unsubsidized permanent position.
- (7) Verify the refugee's cash assistance (CA) status and date of arrival into the U.S. at the time a participant is placed in employment.
- (8) All job placements of adult family members receiving public assistance must be reported to the public assistance agency (W-2 agency) within ten (10) working days.

C. Instructions to Complete Attachment #1.

There is an example Quarterly Program Report (attached) that can be used as a reference in order to complete future reports. The instructions below reference column numbers that on Attachment #1.

On Attachment #1, enter the refugee agency name and reporting quarter and year at the top of the Attachment 1 form. List all individuals/clients placed into jobs by:

- (1) First, determine the **Gender**.
- (2) Enter the Name in the appropriate Gender row) (Blank **column #1**, see the attached example form).
For example, if John Q (male) entered employment in the reporting quarter, enter his name in the first 'male' row.
If Jane Q (female) entered employment her name will be typed in the second row.
- (3) Enter the Social Security Number in the blank **column #2**.
- (4) Enter the Date the refugee entered the United States in blank **column #3**.
- (5) Enter the Date the refugee Entered Employment in blank **column #4**.
- (6) If applicable, enter the Date Cash Assistance was Terminated or Reduced in blank **column #5**.
- (7) Enter name of the Employer in blank **column #6**.
- (8) Enter the Hourly Wage in blank **column #7**.

D. Cash Assistance Status

Indicate by entering the number "1" in the appropriate Cash Assistance column for each refugee that gained employment. Determine how long the refugee was in the U.S. at the time he/she entered employment, and whether the refugee gained a full-time or part-time job.

- ◆ Full-time employment is defined as 35 hours per week or more.
- ◆ Part-time employment is defined as fewer than 35 hours per week.

Examples:

(1) If the was receiving RCA and in the U.S. less than four months when entering employment:

- (a) If the refugee was receiving RCA, and was in the U.S. for a period less than four months at the time full-time employment was secured, enter "1" in blank **column #8**.
- (b) If the refugee was receiving RCA, and was in the U.S. for a period less than four months at the time a part-time job was secured, enter "1" in **column #9**.

(2) If the was receiving RCA and in the U.S. between four and eight months when entering employment:

(a) If the refugee was receiving RCA, and was in the U.S. for a period between five and eight months at the time full-time employment was secured, enter "1" in **column #10**.

(b) If the refugee was receiving RCA, and was in the U.S. between 5 and 8 months at the time part-time employment was secured, enter a "1" in **column #11**.

(3) If the refugee was receiving Wisconsin Works (W-2) , and was in the U.S. for a period less than 12 months when entering employment:

(a) If the refugee was receiving W-2, and was in the U.S. for a period less than 12 months at the time full-time employment was secured, enter a "1" in **column #12**.

(b) If the refugee was receiving W-2, and was in the U.S. for a period less than 12 months at the time part-time employment was secured, enter a "1" in **column #13**.

(4) If the refugee was receiving Wisconsin Works (W-2) , and was in the U.S. for a period greater than 12 months when entering employment:

(a) If the refugee was receiving W-2 and was in the U.S. for a period greater than 12 months at the time full-time employment was secured, enter a "1" in **column #14**.

(b) If the refugee was receiving W-2 and was in the U.S. for a period greater than 12 months at the time part-time employment was secured, enter a "1" in **column #15**.

(5) If the refugee was receiving Other Cash Assistance and was in the U.S. for a period less than 12 months when entering employment:

(a) If the refugee was receiving Other Cash Assistance, and was in the U.S. for a period less than 12 months at the time full-time employment was secured, enter a "1" in **column #16**.

(b) If the refugee was receiving Other Cash Assistance, and was in the U.S. for a period less than 12 months at the time part-time employment was secured, enter a "1" in **column #17**.

(6) If the refugee was receiving Other Cash Assistance and was in the U.S. for a period greater than 12 months when entering employment:

(a) If the refugee was receiving Other Cash Assistance, and was in the U.S. for a period greater than 12 months at the time full-time employment was secured, enter a "1" in **column #18**.

(b) If the refugee was receiving Other Cash Assistance, and was in the U.S. for a period greater than 12 months at the time part-time employment was secured, enter a "1" in **column #19**.

(7) If the refugee was NOT receiving Cash Assistance and was in the U.S. for a period less than 12 months when entering employment:

- (a) If the refugee was not receiving Cash Assistance, and was in the U.S. for a period less than 12 months at the time full-time employment was secured, enter a "1" in **column #20**.
- (b) If the refugee was not receiving Cash Assistance, and was in the U.S. for a period less than 12 months at the time part-time employment was secured, enter a "1" in **column #21**.

(8) If the refugee was NOT receiving Cash Assistance and was in the U.S. for a period greater than 12 months when entering employment:

- (a) If the refugee was not receiving Cash Assistance, and was in the U.S. for a period greater than 12 months at the time full-time employment was secured, enter a "1" in **column #22**.
- (b) If the refugee was not receiving Cash Assistance, and was in the U.S. for a period greater than 12 months at the time part-time employment was secured, enter a "1" in **column #23**.

E. Grant Termination/Grant Reduction Status

If Cash Assistance has ended ('terminated') as a result of the refugee securing employment:

- (1) Enter "1" in **column #24** if the cash assistance grant ended.
- (2) Enter a "1" in **column #25** if the cash assistance was reduced.

F. Health Benefits.

The Health Benefits column captures information on health benefit availability for those individuals who have entered full-time employment. This is not a measure of how many individuals actually elect to enroll in health benefits. Instead it is a measure of how many refugees were offered health benefits, either at time of the placement or at any time within six months of placement.

Benefits are considered available if coverage is offered to the refugee employee, even if coverage is not extended to the employee's family members. Benefits are considered available without regard to whether the employee must contribute to the premium.

Enter "1" in **column #26**, if the refugee is offered health benefits by the employer.

G. Employed 90 Days Later.

This item is a measure of continued participation in the labor market, not retention of a specific, or the same, job. Employed means working for wages on the 90th day at any unsubsidized job. In the event that there are multiple placements with the same individual within the same reporting period, the date of the first employment entry is the start date for calculating the 90-day follow-up. An individual who is on strike on the 90th day is considered employed. An individual who has been laid off and does not anticipate returning to the same employer within 30 days is considered unemployed.

The refugee does not have to retain employment with the same employer in order to count towards 'retained employment for 90 days.' The information on 90 day retentions are reported in the same categories as the original entered employments, based on the category of cash assistance the individual was reported as receiving at the time of entry into employment.

If the refugee remains employed 90 days after the initial placement, remove the "1" that was placed in the Cash Assistance Status when Entering Employment (**column 8 through 23**) and move a "1" to the appropriate 90 day retention column (**column 27 to Column 34**).

There is a macro in Attachment 1 in the 90 day retention section that will automatically complete the 90 day retention totals on Schedule C.

To complete **columns 27-34** on Attachment #1:

(1) Refugees who were receiving RCA immediately prior to entering employment:

- (a) If the refugee was receiving RCA at the time full-time employment was secured, enter "1" in **column #27** to indicate 90 day job retention.
- (b) If the refugee was receiving RCA at the time part-time employment was secured, enter "1" in **column #28** to indicate 90 day job retention.

(2) Refugees who were receiving W2 immediately prior to entering employment:

- (a) If the refugee was receiving W2 at the time full-time employment was secured, enter "1" in **column #29** to indicate 90 day job retention.
- (b) If the refugee was receiving W2 at the time part-time employment was secured, enter "1" in **column #30** to indicate 90 day job retention.

(3) Refugees who were receiving Other Cash Assistance prior to entering employment:

- (a) If the refugee was receiving Other Cash Assistance at the time full-time employment was secured, enter "1" in **column #31** to indicate 90 day job retention.

- (b) If the refugee was receiving Other Cash Assistance at the time part-time employment was secured, enter "1" in **column #32** to indicate 90 day job retention.

(4) Refugees who were not receiving Cash Assistance prior to entering employment:

- (a) If the refugee was not receiving Cash Assistance at the time full-time employment was secured, enter "1" in **column #33** to indicate 90 day job retention.
- (b) If the refugee was not receiving Cash Assistance at the time part-time employment was secured, enter "1" in **column #34** to indicate 90 day job retention.

Chapter IV Schedule C: Services Report

Refugee participation, program costs, and program outcomes funded by the federal Office of Refugee Resettlement (including services listed under 45 CFR 400.154(a)(c)(d) and (e) for the Targeted Assistance Program and Social Services Program) are reported the employment and training quarterly report.

- (1) The outcome information that is reported on Page 1 and Page 2 must represent unduplicated Employment Service outcomes for the entire quarter
- (2) Active participants in English Language Training, On the Job Training (OJT), skills training, case management and supportive services are reported on Schedule C: Services Report, page 2, Other Services.
- (3) In order to complete the Schedule C, Services Report accurately, complete the attachment listing refugees placed into employment first. Attachment 1 is a list of Placements/Entered Employment.

Entering information on the Employment & Training Schedule C: Services Report

There is a macro in the MS Excel spreadsheet that completes a portion of Schedule C as information is added to Attachment 1. However, Grant Termination, Grant Reduction, numbers trained and Average Wage information must be determined manually and added to Schedule C.

To complete Schedule C:

- (a) Enter the name of your refugee agency in the "Agency" block.
- (b) Place an 'X' in the appropriate "Quarter" block to indicate the current quarter.

Row A. Total Caseload for Services

Total caseload is defined as the unduplicated number of participants enrolled in employment services that comprise the total caseload eligible for services at any time during the reporting period.

Number of Individuals Enter the number of participants enrolled in employment services that comprise the total number of eligible adult participants (individuals) eligible for services at any time during the reporting period.

- (1) Enter the number of Male (M) individuals in row A in the "Male" block.
- (2) Enter the number of Female (F) Individuals) in row A in the "Female" block.

Number of Cases (Families). The total Refugee Cash Assistance (RCA) Cases, Wisconsin Works (W-2) Cash Assistance Cases and Non Cash Assistance Cases must be either equal to or smaller than the total number of Individuals (male and female) reported in Item 1 and 2, above.

- (3) RCA Cases. Enter the number of cases who are receiving Refugee Cash Assistance (RCA) in row A in the "RCA Cases" block.
- (4) W-2 Cases. Enter the number of cases/families that are participating in W-2 in row A in the "W-2 cases" block.
- (5) Not Cash Assistance Cases (Not CA). Enter the number of cases/families who are not receiving W-2 or RCA cash assistance in the "Not CA cases" block.

Row B. Active Participants this Quarter

An active participant in employment services is defined as a person with whom your agency has regular and direct involvement in planned employment-related activities at any time during the reporting quarter for the purpose of assisting the individual in preparation for, development of, placement in, or maintenance of, employment.

- (a) Numbers reported in this item must be unduplicated for the quarter.
- (b) This unduplicated number may include new enrollees and participants from previous quarters who were active this quarter.

Number of Individuals

- (1) Enter the total number of active Male (M) participants in row B in the "Male" block.
- (2) Enter the total number of active Female (F) participants in row B in the "Female" block.

Number of Cases (Families).

- (3) RCA Cases. Enter the number of active cases that are receiving Refugee Cash Assistance (RCA) in row B in the "RCA Cases" block.

- (4) W-2 Cases. Enter the number of active cases that are participating in W-2 in row B in the "W-2 Cases" block.
- (5) Not Cash Assistance (Not CA) Cases: Enter the number of active cases this quarter that are not receiving W-2 or RCA assistance in row B in the "Not CA Cases" block.

Row C Entered Employment this Quarter

Notify the county and /or W-2 agency with ten (10) working days the names of refugees receiving assistance (W-2, RCA, Food Stamps, etc.) that gained employment, or a pay raise.

If you enter job placement information on Attachment #1 on the BMRLS Schedule C spreadsheet (in Microsoft Excel), then the employed refugees will total by cash assistance status in Row C (1), (2), (3), and (4) automatically.

Review row C(1) (RCA), row C(2) (W-2) row C(3) (Other CA) and C(4) (no CA) and verify that the formula embedded in the spreadsheet accurately reflects the information you entered on Attachment #1.

Grant Terminations

Review Chapter I for the definition of Grant Termination. On the Schedule C form, review rows C(1), C(2) and C(3) and enter the appropriate number of Grant Terminations for each cash assistance category in the "GT this Quarter" column. The number of grant terminations in each row cannot exceed the number of refugees employed in that category.

Grant Terminations are reported in the appropriate cash assistance status (RCA, W-2 or Other CA) row and in accordance with the amount of time from date of entry in the U.S. to date of entered employment.

For example, in row C(1)(a) enter the number of RCA Grant Terminations or those refugees that have resided in the U.S. less than 4 months.

Continue on to row C(2) (W-2) and C(3) (Other CA) and indicate if any refugees employed during the quarter who were receiving W-2 or Other Cash Assistance and their case closed.

For example, enter the number of employed refugees who have been in the U.S. more than 12 months that were receiving W-2 benefits (and no longer will be receiving cash assistance) in row C(2)(b).

Grant Reductions

Review Chapter I for the definition of Grant Reduction. On the Schedule C form, review rows C(1), C(2) and C(3) and enter the appropriate number of Grant Reductions for each cash

assistance category in the "GR this Quarter" column. The number of grant reductions in each row cannot exceed the number of refugees employed in that category.

Enter the number of Grant Reductions/Grant Diversions achieved as a result of entered employment in the appropriate category (RCA, W-2, Other CA or No CA) by type of cash assistance and time elapsed from date of entry into the U.S.

Follow the same general instructions for Grant Terminations above, and enter the number of cases that have been reduced in rows (C(1), C(2) and C(3).

Year-to-Date (Y-T-D) and Goal

- (a) Grant Terminations Year-to Date. The total number of Grant Terminations will automatically be completed by a formula in the GT YTD column once you have entered the appropriate numbers of Grant Terminations in the "GT this Quarter" column.
- (b) Enter the Grant Termination **Annual Goal** (number) for the current contract year in the "GT Goal" block." The Grant Reduction Annual Goal can be found in your agency's refugee action plan., from your agency's Annual Action Plan in the "GT Goal" block.
- (c) Grant Reductions Year-to Date. The total number of Grant Reductions will automatically be completed by a formula in the GR YTD column once you have entered the appropriate numbers of Grant Reductions in the "GR this Quarter" column.
- (d) Enter the Grant Reduction **Annual Goal** (number) for the current contract year in the "GR Goal" block. The Grant Reduction Annual Goal can be found in your agency's refugee action plan.

Total former RCA, W-2, Other CA, and No CA refugees now employed (rows C(1), C(2), C(3), and C(4)

The total number of full time and part time refugees employed in the reporting quarter will appear in this row by a formula that uses information entered on Attachment #1. Verify that the information is correct by cross-referencing this number with the number of refugees you entered on Attachment #1.

Row D, Average Hourly Wage at Employment Entry

Enter the average hourly wage at employment entry for all individuals reported in rows C91), C(2), C(3), and C(4) above.

Calculate the average hourly wage at placement separately for full and part-time entered employment by gender for the current quarter.

- (1) Enter the Average Wage for full-time male employees in row D in the "Full-time Male" block.
- (2) Enter the Average Wage for full-time female employees in row D in the "Full-time Female" block.
- (3) Enter the Average Wage for part-time male employees in row D in the "Part-time Male" block.
- (4) Enter the Average Wage for part-time female employees in row D in the "Part-time Female" block.

Row E, Health Benefits

The total number of refugees offered health benefits are automatically completed by the information entered on Attachment 1. Verify that this information is correct by cross-referencing this number with the number of refugees you indicated received health benefits on Attachment #1.

Row F, Employed 90 Days Later

The total number of refugees employed 90 days later are automatically completed by the information entered on Attachment 1. Verify that this information is correct by cross-referencing this number with the number of refugees you indicated are employed 90 days later on Attachment #1.

The information on 90-day retention is reported in the same categories as the original entered employment (based on the refugee's previous cash assistance category). Cash assistance status in the retention report reflects the status at the time of placement, rather than the time of retention follow-up.

Row G. Program Expenditures this Quarter.

Enter the amount of program expenditures (\$) for the current quarter in this block. This information can be derived by totaling the monthly Refugee CORE Expenditure reports for the applicable reporting quarter.

Chapter V

Instructions for Completing Page 2 Other Services

Other Services, Page 2 of the QPR, reports service outcomes other than the direct employment service outcomes. Direct employment service outcomes are reported on Attachment 1 and Schedule C. Other service may include any of the employability services described in 45 CFR400.154 (b) through (j), e, g., OJT, English Language Training (ELT), etc.

Duplication may occur across service categories, for example, an individual may be enrolled in ELT and concurrently be participating in Case Management. Both activities must be reported.

Row 1. English Language Training: English language training for non-native English speakers is a course of instruction in English with an emphasis on acquisition of survival and employment-related reading, writing, listening, and speaking skills.

Row 1.A. Total Active Male Participants in an English Language Training program (residing in the U.S. between 0-12 months and greater than 12 months). This number is an unduplicated count of active male participants who are participating in English Language Training during the reporting quarter.

Active participant means a person with whom the provider has direct contact for the purpose of providing the service contracted during the quarter. Count and report each active participant once per quarter. Months in the U.S. is calculated as the time elapsed from the date of entry in the U.S. to the date service began. Information is reported in two time categories: 0 - 12 months and greater than (>) 12 months.

The Total number of refugee participants in ELT is automatically totaled by a spreadsheet formula in Row 1.A. for males and for females from the information you enter in rows 1.A.(1) and 1.A(2).

*Example: Enter the number of refugee male participants who are participating in ELT in the current quarter that have been in the U.S. less than 12 months in **Row 1.A(1)** under the Male column.*

Row 1.B. ELT Completions. Enter the number of male and female refugees that have completed an ELT class. This includes students who have completed one ELT course and plan to continue on to the next level.

Row 2. Training

Row 2.A. On-the-Job Training (OJT) (residing in the U.S. between 0-12 months and greater than 12 months).

On-the-Job-Training is the placement of an employable adult refugee in subsidized employment funded by the Office of Refugee Resettlement (Social Service or Targeted

Assistance Program funding) for a period of time after which the employer has agreed to hire the OJT trainee in permanent, unsubsidized employment.

OJT costs are an authorized expense of SS and TAP funds. Following the same methodology described for completing Row 1, English Language Training, enter the number of male and female participants in the OJT program.

The Total number of refugee participants in OJT is automatically totaled by a spreadsheet formula in Row 2.A(1) from the information you enter in rows 2.A(1)(a) and 2.A(1)(b).

*Example, enter the number of refugee male participants in OJT that have been in the U.S. less than 12 months in **Row 2.A(1)(a)** in the Male column.*

Row 2.A.2. OJT Completions. Enter the number of participants that have completed an OJT program this quarter.

Row 2. B. Skill Training.) (residing in the U.S. between 0-12 months and greater than 12 months).

Skill training is training of short-term duration designed to teach refugees specific job-related skills that prepare them for a specific job or type of employment, such as a nursing assistant, electronic assembly, or power sewing, etc. Agencies establish a training goal in their annual Refugee Action Plan. The category will be also be completed on the Social Service QPR if an agency is conducting a training program with SS funds.

The Total number of refugee participants in skill training is automatically totaled by a spreadsheet formula in Row 2.B(1) from the information you enter in rows 2.B(1)(a) and 2.B(1)(b).

*Example, enter the number of refugee male participants in skills training that have been in the U.S. less than 12 months in **Row 2.B(1)(a)** in the Male column.*

Row 2.B.2. OJT Completions. Enter the number of participants that have completed a skills training program this quarter.

Row #3. Case Management:

Social Service and TAP funds can be used to help meet the changing needs of refugee families. The Case Management service component has been included in the Social Services and TAP/Employment QPRs for many years, and remains a required service of the federal Office of Refugee Resettlement (ORR) and Wisconsin's Bureau of Migrant, Refugee and Labor Services.

Case Management is a systematic, progressive method of screening, assessing and planning to assist the refugee family become self-sufficient. Services include intake, assessment, development of an Employability Development Plan (EDP), or Family Self-Sufficiency plan orientation, information/referral, service arrangement, individual advocacy, follow-up and the

continual monitoring and adjusting of the refugee's participation in such services. Both employment and non-employment related are allowable services under case management.

An active participant in Case Management services is a person with a written case plan (including those in the assessment/plan development stage) with whom the case manager has regular and direct involvement in activities related to completion of the case plan goals at any time during the quarter. Review the Refugee Case Management Instructions published in September 2002 for details on how to develop a Family Self-Sufficiency Plan and document Case Management goals and outcomes.

Reporting Case Management Goals and Outcomes

In Row #3, record the number of individuals who have specific Case Management goals in their Family Self-Sufficiency Plans, and summarize the specific goals and services provided to help the family reach their goals in the Narrative portion (Schedule A) of the QPR. All client contacts and services provided, including contact and follow-up dates, must be documented in the case file.

The number of participants in Case Management should be included in the total caseload reported on Schedule C (e.g. the refugee active caseload reported on Schedule C must exceed the total number of refugee participants in Case Management on page 2, Other Services).

Row 3.A Case Management (residing in the U.S. between 0-12 months and greater than 12 months).

The Total number of refugee participants in case management is automatically totaled by a spreadsheet formula in Row 3.A from the information you enter in rows 3.A.(1) and 3.A(2).

*Example, enter the number of refugee male participants that have a documented case management goal in their FSP that have been in the U.S. less than 12 months in **Row 3.A(1)** in the Male column.*

Row 3.B. Incidences. Enter the number of contacts made with persons involved in Case Management activities. This number can be duplicative.

Row 3.C. Case Management Completions. Enter the number of participants that have achieved their case management goal (and documented in their FSP) in the reporting quarter.

Although clients may have more than one Case Management goal outlined in their EDP or FSP, only one Case Management outcome per client can be reported in the QPR each quarter.

Row 4. Other Services:

Other Services includes any supportive services provided (or example, childcare, transportation, translation, assisting with changes of status, citizenship preparation, etc.) to enable the individual to obtain and keep a job. Enter the numbers of people served this quarter.

Row 4.A. The total number of refugee participants that you have helped by providing Supportive Services is automatically totaled in a spreadsheet formula from the information you enter in rows [4.A.\(1\)](#) and [4.A.\(2\)](#).

Row 4.B Incidences. Enter the number of contacts made with persons involved in Supportive Services. This number can be duplicative.

Row 5. Citizenship Initiative. Social Services QPRs ONLY.

On Social Service Quarterly Program Reports, describe classes and other related activities conducted for under five-year refugee population to help prepare them for citizenship testing in the Narrative portion of the QPR.

Row 5.A. Record the number of refugees who have attended U.S. citizenship classes in the reporting quarter. This number is NOT duplicative.

Row 5.B. Record the number of refugees who have completed citizenship applications, including change of status applications (INS Form N-400), in the reporting quarter. This number is NOT duplicative.

Row 5.C. Record the number of refugees who became naturalized U.S. citizens (gained their U.S. citizenship) in the reporting quarter. This number is NOT duplicative. All refugees who gain the U.S. citizenship will be reported on the Social Service QPR, regardless of the amount of time they have resided in the U.S.

Helping refugees with the Change of Status application is a step that can require intensive effort by the refugee agency. If the refugee states that this is a goal, and it is documented in the Self-Sufficiency Plan as a Case Management goal, then assisting the refugee in acquiring the 'green card' (Permanent Resident Alien card) can be considered a case management outcome. In these cases:

- (1) Document and outline the steps necessary to acquire the Permanent Resident Alien card in the Self-Sufficiency Plan.
- (2) Document when the refugee forwarded the Change of Status application.
- (3) Filing the Change of Status application is then an outcome can then be reported in paragraph 3.c. Cases Completing Goals other than Employment on page 2, Other Services, on the Social Service QPR.

6. Targeted Assistance Program Quarterly Program Reports

Identify

- (1) the number of over five years population in your service delivery area,
- (2) the number of those who have already obtained their citizenship, and
- (3) the number whose applications are pending with INS.

These numbers need only be reported for the first and fourth quarterly reports. Describe mass application filing and testing, the number who obtained citizenship during the quarter and other related activities, experiences or problems encountered.

Chapter VI Common Quarterly Program Reporting Errors

The items identified below are errors frequently found in the employment and training Quarterly Program Reports. Use the checklist below to review your agency's Social Service and Targeted Assistance Program employment and training QPR's before forwarding to the Bureau of Migrant, Refugee and Labor Services. Refugee employment placements can only count towards **ONE** of the employment programs: either Social Services or the Targeted Assistance Program.

Document	Potential Problem	Recommended Solution
<i>Cover Sheet</i>	Agency Director did not sign	Agency Director must review and sign all QPRs forwarded to the BMRLS
<i>Narrative</i> QPR's are often forwarded without a narrative.		The narrative allows you to report: <ul style="list-style-type: none"> • The numbers of refugees who lost their jobs because of a lay-off, • The numbers of refugees claiming unemployment insurance. • Citizenship activities. • ESL on the worksite. • Interpretation requirements and services. • Community activities. • Include newspaper articles, fliers, etc. about your programs.
<i>Schedule C</i>	GT and GR goals not entered	Your agency's action plan has the current employment & training goals. Or ask your contract monitor.
	90-day job retention follow ups not reported	Report refugees who remain employed 90 days after their job placement (it doesn't have to be the same employer for 90 days for it to count). Attachment #1 can be used as a checklist.
<i>Schedule C, page 2 "Other Services"</i>	Not all agencies are using the current QPR	Use the form distributed for 2004. The updated form allows agencies to report Case Management goals in paragraph 4, and report citizenship activities in paragraph 5.
	<i>Attachment 1</i>	Refugee employment cannot count as both a Grant Terminations and Grant Reduction
Reporting Match Grant Recipients		<ul style="list-style-type: none"> • The same refugee employment can be counted towards both Reception and Placement and Social Service or Targeted Assistance Programs. • A refugee Match Grant recipient cannot be reported on the employment portion of the Social Service or Targeted Assistance Program Quarterly Program Reports.
Defining Grant Terminations		Include source of public assistance on attachments, describe the success in the narrative.

Enclosures:

2004 Example Refugee Social Service QPR.xls